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L9: Entry 1 of 1   File: USPT   Jun 15, 1993

US-PAT-NO: 5220500
DOCUMENT-IDENTIFIER: US 5220500 A
** See image for Certificate of Correction **

TITLE: Financial management system

DATE-ISSUED: June 15, 1993

INVENTOR-INFORMATION:

NAME	CITY	STATE	ZIP CODE	COUNTRY
Baird; Andrew V.	Malden	MA		
Boyer; William E.	Boston	MA		
Pithavadian; Shakunthala S.	Cambridge	MA		

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NAME	CITY	STATE	ZIP CODE	COUNTRY	TYPE CODE
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APPL-NO: 07/ 409650   [PALM]
DATE FILED: September 19, 1989

INT-CL: [05] G06F 15/20, G06F 15/38

US-CL-ISSUED: 364/408; 364/419
US-CL-CURRENT: 705/36

FIELD-OF-SEARCH: 364/408, 364/406, 364/401, 364/419

PRIOR-ART-DISCLOSED:

U.S. PATENT DOCUMENTS

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	PAT-NO	ISSUE-DATE	PATENTEE-NAME	US-CL
☐	4903201	February 1990	Wagner	364/408
☐	4989141	January 1991	Lyons et al.	364/408

OTHER PUBLICATIONS

Hypercard User's Guide, Apple Computer, Inc., 1988, pp. 15-17.
Aho et al. (Chapters 4 and 5 of Compilers: Principles, Techniques, and Tools, Addison-Wesley, Reading, Mass. 1986).

ART-UNIT: 231

PRIMARY-EXAMINER: Envall, Jr.; Roy N.

ASSISTANT-EXAMINER: Poinvil; Frantzy

ATTY-AGENT-FIRM: Fish & Richardson

ABSTRACT:

A method for enabling a u██r to interactively create and m██ify a model of an investment strategy to be ██plied to data pertaining to a ██ of possible investment entities. A graphical representation of a sequence of statements which describe data manipulations corresponding to the investment strategy is provided; the result of the sequence of statements, when applied to the data, is a selection of a subset of entities from the set of possible entities. The user is enabled to interactively enter and manipulate the statements and the sequence of statements via the graphical interface to alter the investment strategy. The user may "run" the strategy via the graphical interface, using the data to derive the subset of entities.

16 Claims, 46 Drawing figures

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L2	(((705/36)!.CCLS.))	835	L2
L1	((705/35)!.CCLS.)	890	L1

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